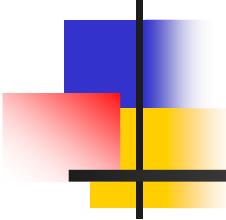


# The Presenter's Path®

Presentation Skills for Investment Professionals



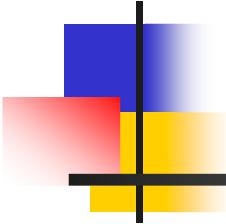
CFA 2010 Society Leadership Conference



# My First CFA Presentation



Seattle Society of Financial Analysts - 1982



# In 2010?

“Uncertainty”

“Lost decade”

“Career stagnation”

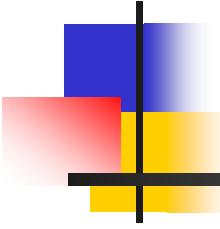
“Overloaded”

“Media hypersensitivity”

“Violently sideways  
trading market”

“No time to prepare”

“Less time to volunteer”



# The Solution: Add Value



Connect with your audiences



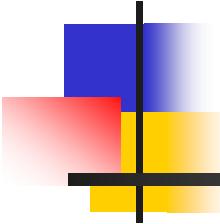
Create clear, concise and compelling content



Communicate with confidence

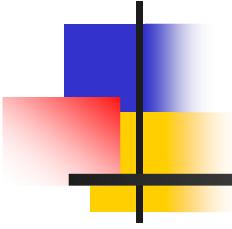


Collaborate across cultures



# Connect

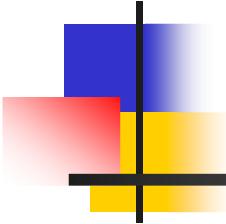




# Know The Audience and Territory



- Audience
- Territory
- Value



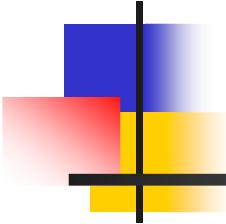
# Know The Audience and Territory

## Scenario 1: Endowment Pitch

- What: Proprietary Selection Process (PSP)

“We create a number ranking for each stock, which determines if it’s in our portfolio.”

- So What: Value
  - Compare companies across industries
  - Create a well-balanced/high performing portfolio
  - Capture growth. 3% over benchmark...



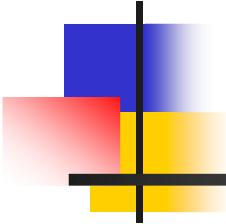
# Know The Audience and Territory

## Scenario 2: Research Manager

- What: Market Update

“If earnings continue on this path, the S&P 500 is priced at 8% yield, while 10-year treasuries are at 3%...”

- So What: Value to Client Communication
  - Context: “objectively, the stock market is cheap...”
  - Confidence: “share our perspective that ...”



# Know The Audience and Territory

## Communication Styles



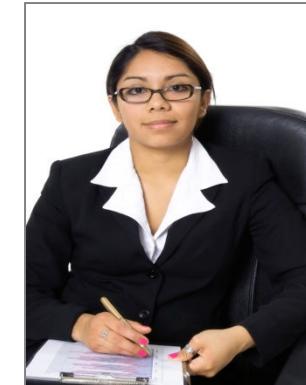
**Dominant/  
Driver**



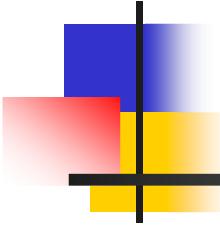
**Sociable/  
Influencer**



**Amiable/  
Steady**



**Conscientious/  
Analytical**



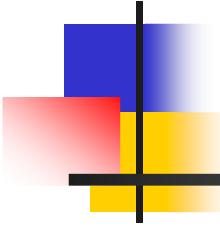
# Know The Audience and Territory

## Communication Styles



- Assertive, direct and action – oriented
- Focus on results
- Provide options and let them decide

**Dominant/  
Driver**



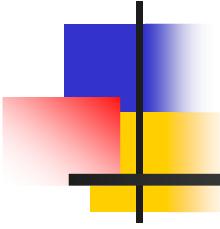
# Know The Audience and Territory

## Communication Styles



**Sociable/  
Influencer**

- Outgoing, animated
- Focus on people, involvement, who is using product/service
- Be enthusiastic and provide ideas for implementation



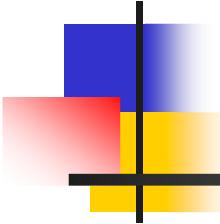
# Know The Audience and Territory

## Communication Styles



### **Amiable/ Steady**

- Calm, listens well, may avoid conflicts
- Focus on support, service and stability
- Provide step-by-step implementation plans



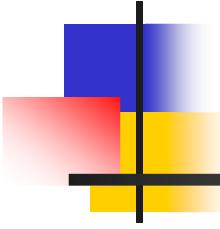
# Know The Audience and Territory

## Communication Styles



### **Conscientious/ Analytical**

- Very well organized, less emotional – more objective
- Focus on logic, order and accuracy
- Clarify priorities and criteria for decisions
- Emphasize past record



# Know Your Style

## Communication Styles



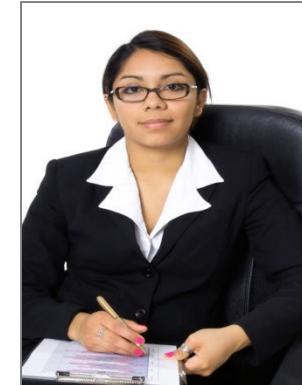
**Dominant/  
Driver**



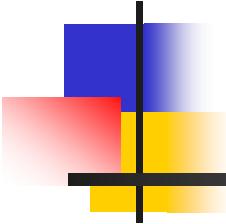
**Sociable/  
Influencer**



**Amiable/  
Steady**

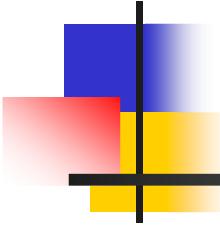


**Conscientious/  
Analytical**



# Clear

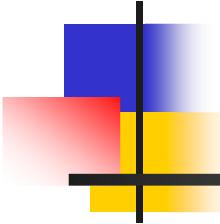




# Create Your Message



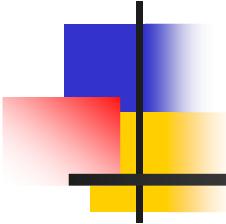
*"We believe that you  
do have opportunities!"  
in Emerging  
Markets."*



# Target Your Content



- Select 3-4 points
- Focus on what the audience needs to know
- Build in a buffer

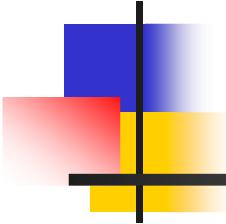


# Make It Easy to Understand

## Current Events



- Provide a broader perspective to your information
- Examples: new government regulations; industry trends; news items; discoveries or innovations.



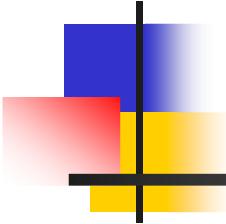
# Make It Easy to Understand

## Example/Evidence



- Provide data on results and track record.

*"In working with the State University endowment, we created a plan that reduced the number of funds from 6 to 3 which saved them \$15,000 per year in fees and delivered returns of ..."*

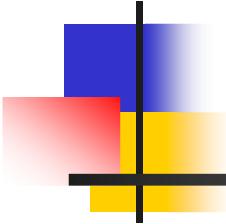


# Make It Easy to Understand

## Similes/Analogies



- Provide comparison between dissimilar items
  - “X” is like “Y”
- Help reduce confusion
- Fit the analogy to the audience

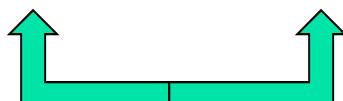


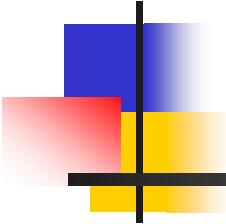
# Make It Easy to Understand

## Tell A Story With The Numbers

Startup.com

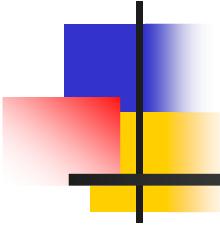
	2009	2010	2011	2012	2013
<b>Revenue</b>	\$ 642,424	\$ 2,875,964	\$13,223,679	\$31,658,080	\$47,731,762
<b>Gross Margin</b>	34%	87%	96%	98%	98%
<b>Net Profit</b>	\$(2,478,379)	\$ (941,807)	\$ 6,088,740	\$19,797,788	\$20,094,030
<b>Net Margin</b>	-386%	-33%	46%	63%	42%
<b>Cash</b>	\$ 1,447,744	\$ 1,132,744	\$ 6,383,685	\$18,953,719	\$39,342,670





# Confident

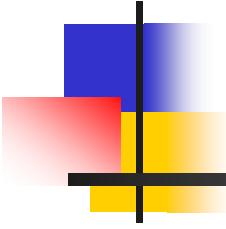




# Channel Your Energy

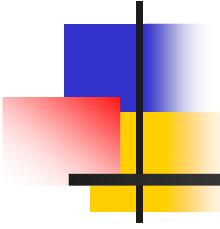


- Posture
- Movement
- Gestures/Animation
- Pause/Breathe
- Eye Contact



# Culturally Agile

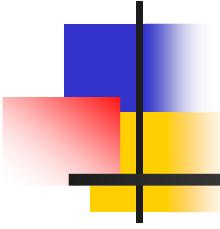




# Understand Impact of Culture



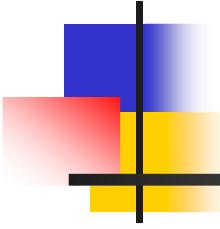
*"The Japanese  
need to show  
more passion."*



# Understand Impact of Culture



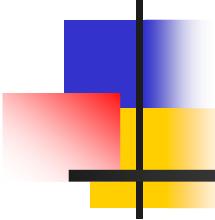
*"The Americans  
need to  
understand that  
it's not just about  
money."*



# Understand Impact of Culture



*"It's South  
America's time."*



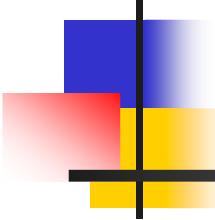
# Understand Impact of Culture



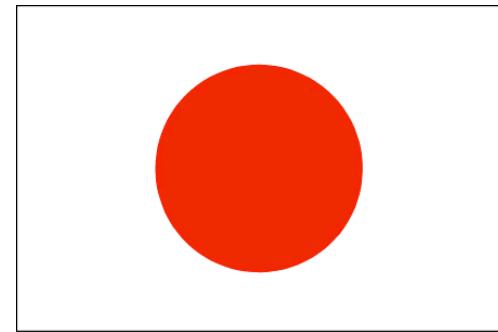
Task Completion  
Equality  
Direct  
Individual  
Short Term Focus



Relationships  
Social Status  
Indirect  
Consensus  
Long Term Focus



# Understand Impact of Culture



Task Completion



Relationships

Equality



Social Status

Direct



Indirect

Individual

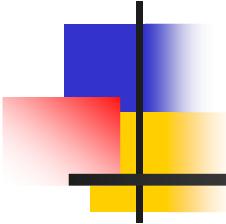


Consensus

Short Term Focus



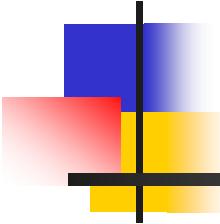
Long Term Focus



# How to Be Culturally Agile?



- Tailor your content
- Adjust the amount and type of group interaction
- Modify your delivery



# Steps to Add Value



Connect with your audiences



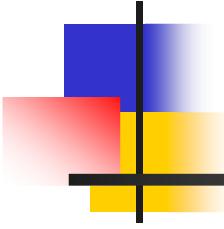
Create clear, concise and compelling content



Communicate with confidence



Collaborate across cultures



# Thank You!

**Questions?**

